

How to Gather Your Tax Documents for 2024



Staying organized during tax season can save you time, stress, and even money. Whether you receive your documents in the mail or access them electronically, having everything in one place ensures you are ready to file accurately and on time. The guide below will help you gather your tax documents effectively.

1- Understand What Documents You Need

The first step in gathering tax documents is knowing which forms and records are necessary. Your tax preparer may provide a tax organizer or checklist, and common documents include:

- **Income Forms:**
 - W-2s for employment income
 - 1099 forms for freelance, contract, or investment income (e.g., 1099-NEC, 1099-MISC, 1099-INT, 1099-DIV, or 1099-B)
 - K-1s for partnerships, S-corporations, and estates/trusts
- **Deduction and Credit Records:**
 - Mortgage interest statements (Form 1098)
 - Student loan interest statements
 - Medical expenses and receipts
 - Childcare expenses with provider details
 - Charitable donation receipts
- **Other Important Documents:**
 - Retirement account contributions (e.g., IRA statements)
 - Health insurance documentation (e.g., Form 1095-A for marketplace plans)

2- Organize Mailed Documents

Many tax documents arrive in the mail in January or early February. To stay organized:

- **Designate a Tax Folder:** Create a physical folder or box labeled “Tax Documents” where you can immediately store incoming forms.
- **Open Mail Promptly:** Review your mail for envelopes from employers, financial institutions, and government agencies that are marked “IMPORTANT TAX DOCUMENT ENCLOSED.”
- **Track What’s Missing:** Use your checklist to ensure you have received all expected documents. If something is missing by mid-February, contact the issuer.

3- Access and Save Electronic Documents

As more institutions transition to electronic delivery, it’s crucial to know where to find your digital tax documents. To access your documents:

- **Log Into Online Accounts:** Check employer portals, bank websites, brokerage accounts, and student loan servicing platforms for downloadable tax forms.
- **Download and Save:** Save each document to a secure location on your computer or cloud storage.
 - Use descriptive filenames like “W-2_EmployerName_2024” for easy identification.
- **Print Hard Copies:** If you prefer physical records, print electronic documents and file them with your mail-in forms.

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4- Maintain a Secure System

Tax documents contain sensitive personal information. Protect them with these tips:

- **Digital Security:**
 - Do not send documents via unsecured email.
 - Store digital files in encrypted folders or secure cloud services.
- **Physical Security:**
 - Keep physical copies in a locked drawer or filing cabinet.
 - Avoid leaving tax documents in visible or unsecured areas.

5- Review and Double-Check

Before filing your taxes review your gathered documents to ensure completeness:

- **Cross-Check:** Verify that you have all income, deduction, and credit records.
- **Match with Checklist:** Confirm that each item on your checklist is accounted for.
- **Contact Issuers if Needed:** If any forms are incorrect or missing, reach out to the issuer immediately for corrections or reissues.

Final Thoughts

By staying proactive and organized, gathering your tax documents doesn't have to be a daunting task. Whether you're dealing with mailed forms, electronic files, or both, a systematic approach will help you file your taxes with confidence.

Happy filing!

If you have any questions about the items on this guide, our Client Relations team is always available.

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